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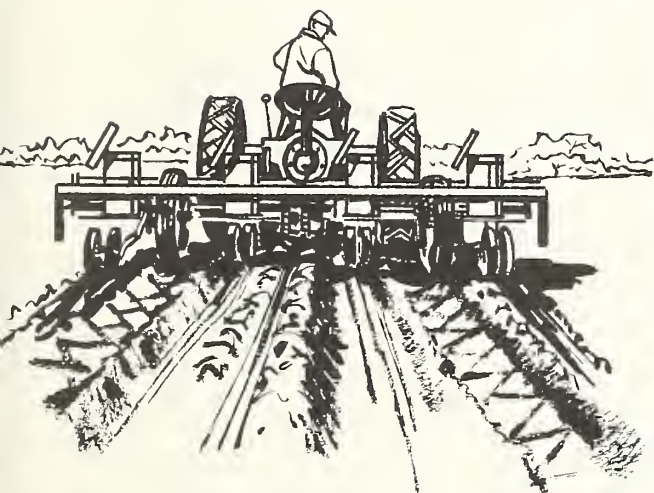
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1971
**VEGETABLES FOR
COMMERCIAL
PROCESSING**



acreage marketing guides



U.S. DEPARTMENT OF AGRICULTURE-CONSUMER AND MARKETING SERVICE

MARCH 1971

PREFACE

Acreage-marketing guides are prepared each year for principal vegetables used for canning and freezing. The commodities included are lima beans, snap beans, beets, cabbage for sauerkraut, sweet corn, cucumbers for pickles, green peas, spinach and tomatoes.

USDA's Consumer and Marketing Service continually studies markets for canned and frozen vegetables. These studies include evaluations of the pack per unit of production, per capita use, rate of disappearance of processed supplies in the current season compared with recent seasons, prices, and estimated carryover stocks. On the basis of these studies, recommendations have been developed for acreage levels in 1971, which with average yields, will result in a production for processing that will provide adequate quantities of principal canned and frozen vegetables to supply usual market needs. These recommendations were also reviewed by representatives of other USDA agencies who are familiar with the vegetable industry.

The final recommendations for 1971 vegetables for commercial processing are presented in this publication. In the past, when acreage has been held within the levels recommended by USDA, few marketing difficulties have been encountered.

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1971 VEGETABLES FOR COMMERCIAL PROCESSING
ACREAGE-MARKETING GUIDES

I. HIGHLIGHTS

The 1970 carryovers of principal canned and frozen vegetables ranged from light to moderate and packs generally were in line with market requirements. As a result, 1970/71 total supplies of processed vegetables are in an improved balance compared with last season, and substantially below 1968/69 when supplies of most items were excessive.

The 1970/71 aggregate supply of canned lima beans, snap beans, beets, sauerkraut, sweet corn, and green peas approximated 200 million cases, basis 24/303's. This is 5 percent less than in 1969/70 and 10 percent less than in 1968/69.

Total supplies of canned tomatoes and tomato juice closely matched last year's levels but were well below the heavy supply in 1968/69. Available data indicated an improved balance in supplies of tomato catsup and paste, and holdings of chili sauce were moderate.

The 1970 aggregate carryover of frozen lima beans, snap beans, sweet corn, green peas and spinach was about a seventh less than the 1969 record. And 1970 frozen packs ranged from small to moderate. The 1970/71 aggregate supply of these 5 frozen vegetables was indicated at 1.485 billion pounds, 9 percent less than the 1.634 billion in 1969/70 and 15 percent less than 1.745 billion in 1968/69.

Prices for most processed vegetables show gains compared with 1969/70 winter quotations. At the same time, cumulative disappearance is continuing at a relatively high level. The 1971 carryovers are expected to range from light to moderate, with exceptions being that the carryovers of sauerkraut and cucumber pickles likely will be above average. With anticipated 1970 carryovers at reduced levels, and prospective market needs expected to expand, the 1971 aggregate production recommendation for vegetables for processing is a moderately larger output.

II. 1971 GUIDE RECOMMENDATIONS

Guides for principal vegetables for processing are shown on page 5. The 1971 total acreage guide for 8 principal vegetables (excluding spinach for canning) is 1,719,300 acres, 10 percent more than the 1970 aggregate. Such an acreage, assuming normal abandonment and recent average yields per acre, would result in a production of 9,209,200 tons, 3.6 percent more than in 1970.

III. 1970 SUMMARY

The 1970 acreage of 9 principal vegetable crops for processing was the smallest since 1964 (Figure 1). Total plantings were 7 percent less than in 1969, and 22 percent less than the 1968 record. Acreage reductions were made for all crops except cucumbers for pickles and spinach. The bulk of the acreage reduction was in the West, particularly in Washington and California. Also, Oregon and Maryland acreages showed substantial declines. South Carolina

and Georgia reported significant increases.

Record average yields were reported for cucumbers and tomatoes as well as cabbage for sauerkraut. Relatively low yields were estimated for sweet corn and green peas. But snap bean yields averaged a little higher.

The 1970 aggregate production of lima beans, snap beans, beets, cabbage for sauerkraut, sweet corn, cucumbers for pickles, green peas, spinach, and tomatoes was 9.2 million tons, one percent less than 1969's 9.3 million, and 23 percent less than the 1968 record of almost 12.0 million tons. Production decreases were substantial for lima beans, beets, sweet corn, and green peas. The 1970 tonnages of snap beans and tomatoes were up slightly compared with 1969, and substantial gains were recorded for cabbage for sauerkraut, cucumbers for pickles and spinach.

California was the source of 38.3 percent of the 1970 total vegetable tonnage for processing. Wisconsin ranked second with 9.4 percent followed by Ohio, 6.8 percent, Minnesota, 6.4 percent, and Oregon, 4.8 percent.

Prices received for 1970 sales of processed vegetables (equivalent returns at processing plant door) showed relatively small variation from a year earlier. For lima beans, the average price per ton increased \$4.00, but the snap beans price was down \$4.10. The average tomato price was down slightly; the \$34.00 per ton compared with \$34.70 in 1969 and \$40.00 in 1968.

The 1970 aggregate value of 9 principal vegetables for processing was \$441 million. The comparable values in 1969 and 1968 were \$451 million and \$600 million, respectively. California accounted for almost 31 percent of the total value, Wisconsin, 10 percent, and Oregon, 6 percent.

IV. CANNED VEGETABLES

Canned vegetable supplies are moderately less than a year earlier. A slightly larger 1970 pack was offset by a reduced carryover. Reflecting the improved balance in supplies, prices for most canned vegetables exceed year-earlier levels.

The 1970 carryovers of most principal canned vegetables were smaller than in 1969. Carryovers of canned tomatoes and tomato juice were smaller by 32 percent and 21 percent, respectively. Also, carryovers of snap beans and green peas were each down 18 percent, and sweet corn, 8 percent. The lima bean inventory matched the year earlier level. The cucumber pickle carryover (old and new stocks combined) was up moderately.

The 1970 total pack of principal vegetables was slightly higher than that of a year earlier, with the gain mostly in processed tomatoes. The 1970 pack of canned peeled tomatoes was increased by more than a fifth, and the tomato juice pack was up moderately. The snap bean pack was about equal to a year earlier, but the packs of sweet corn and green peas were reduced by 5 percent and 11 percent, respectively. However, 1970 packs of sauerkraut and cucumbers for pickles were indicated to be higher than in 1969. Trends in packs of selected canned vegetables are shown in Figure 2.

(Continued on page 6)

Table 1.--Principal Commercial Vegetables For Processing

1971 Acreage-Marketing Guides With Comparisons

Commodity	Planted acreage			Production		
			Percentage			Percentage
			change			change
	1971	1970	recommended	1971	1970	recommended
	guide	1,000	in 1971	guide 1/	1,000	in 1971
	acres	acres	Percent	tons	tons	Percent
Beans, Lima:						
Canning	31.2	27.1	+15	27.5	23.4	+18
Freezing	57.9	46.3	+25	69.1	54.0	+28
Total	89.1	73.4	+21	96.6	77.4	+25
Beans, Snap:						
Canning	209.1	190.1	+10	469.9	437.8	+ 7
Freezing	57.0	51.8	+10	133.5	131.8	+ 1
Total	266.1	242.0*	+10	603.4	569.6	+ 6
Beets:						
Canning	16.6	16.6	No change	198.7	207.0	- 4
Cabbage 2/						
Corn, Sweet:						
Canning	349.2	332.6	+ 5	1,469.9	1,399.2	+ 5
Freezing	108.6	94.4	+15	560.9	471.8	+19
Total	457.8	427.0	+ 7	2,030.8	1,871.0	+ 9
Cucumbers:						
For pickles	142.5	142.5	No change	546.0	588.8	- 7
Peas, Green						
Canning	305.2	265.4	+15	346.2	299.9	+15
Freezing	163.0	141.8	+15	207.0	176.4	+17
Total	468.2	407.2	+15	553.2	476.2*	+16
Spinach: 3/						
Freezing	14.3	13.0	+10	80.0	77.0	+ 4
Tomatoes:						
Canning	264.7	247.4	+ 7	5,100.5	5,024.6	+ 2
Total	1,719.3	1,569.1	+10	9,209.2	8,891.6	+3.6

* Does not add to total due to rounding.

1/ Computed: Product of planted acreage guide in 1971, less normal acreage loss, multiplied by the estimated yield per acre.

2/ Cabbage for sauerkraut included in early fall cabbage for fresh market; a 5 percent reduction in acreage is recommended in 1971 early fall cabbage.

3/ Guide for spinach for canning is not included because data on carryover and pack incomplete.

The 1970/71 aggregate supply of canned lima beans, snap beans, beets, sauerkraut, sweet corn, and green peas was estimated at 199 million cases, basis 24/303's. This compares with approximately 210 million cases the previous season. In addition, the 1970/71 total supplies of canned tomatoes and tomato juice, at 50.9 million cases and 46.4 million cases respectively, show little change compared with those in 1969/70, but were well below those in 1968/69. The supply of cucumber pickles is indicated to be larger than last season.

The 1970/71 disappearance of most principal canned vegetables is expected to range from slightly to moderately less than the 1969/70 high total. Through January 1, 1971 cumulative shipments of beets, as reported by canners, were running 9 percent above the comparable period a year earlier. Also, snap bean shipments were slightly larger but lima bean shipments were slightly less, and sweet corn moderately less. Reflecting a sharp reduction in total supply, cumulative shipments of green peas were 12 percent less. Assuming normal movement in the coming months, 1971 carryovers of principal canned vegetables are expected to be below average. Canners' stocks of selected vegetables on January 1 are shown below.

List prices for canned vegetables this winter generally show significant increases compared with last winter, according to trade reports. Price increases are reported for both retail and institutional sizes. The principal exception is that the price for sauerkraut is about equal to last season.

Canners' Stocks of Selected Vegetables

	January 1, 1971	:	January 1, 1970
	<u>Million cases, basis 24/303's</u>		
Lima beans	2.6		3.4
Snap beans	31.5		34.3
Beets	8.9		9.5
Sweet corn	36.1		38.6
Green peas	17.1		20.1
	<u>Million actual cases</u>		
Tomatoes, peeled, California only	15.8		15.3
Tomato juice, California only	10.0		11.4

V. FROZEN VEGETABLES

The 1970 carryover of frozen lima beans, snap beans, sweet corn, green peas, and spinach combined was estimated at 395 million pounds, 13 percent less than the 1969 record of 456 million. Carryovers of lima beans and sweet corn showed small changes compared with a year earlier. But carryover of green peas was down moderately, and snap bean and spinach holdings were substantially less.

The 1970 aggregate raw production for freezing for the above 5 vegetables was 17 percent less than in 1969, and 26 percent less than in 1968. Consequently, the 1970 aggregate frozen pack was moderately less than in 1969 and substantially below that in 1968. Most of the reduction in the 1970 total pack was in sweet corn and green peas (Figure 3)..

The 1970/71 supply, carryover plus pack, of the 5 principal frozen vegetables was indicated at 1.485 billion pounds, down 9 percent from the 1969/70 relatively high total. The bulk of the reduction in supply was in sweet corn, down 67 million pounds and 14 percent, and green peas, down almost 44 million pounds, and 9 percent. Also, the supply of lima beans was 34 million pounds less and the snap bean reduction was almost 14.5 million pounds. The supply of spinach was indicated at 159.0 million pounds, 6 percent more than the 149.0 million a year earlier.

Disappearance of the 5 principal frozen vegetables is running at a relatively high rate. As of January 31, 1971 the cumulative disappearance was estimated at 827 million pounds, about equal to that in 1969/70. On January 31, cold storage holdings of frozen lima beans, snap beans, sweet corn, green peas, and spinach amounted to 658 million pounds, almost a fifth less than a year earlier. Holdings of individual items are shown on page 8.

For most frozen vegetables, list prices are averaging higher than in the 1969/70 season, according to trade reports. Although prices for baby lima beans are moderately lower, Fordhook prices equal year-earlier levels as do those for snap beans. Prices for green peas are up slightly, and those for sweet corn and spinach are up moderately.

Although higher prices may slow movement of frozen vegetables in the coming months, the 1970/71 total disappearance likely will approximate the average for the two recent seasons. If so, the 1971 aggregate carryover of 5 principal frozen vegetables will be the smallest in several years, and substantially less than in 1970. The anticipated small carryover combined with growth in market needs are reflected in the recommendations for substantial increases in 1971 production of principal vegetables for freezing.

Selected Frozen Vegetables: Stocks in cold storage

	<u>January 31</u>		<u>Percentage</u>
	<u>1970</u>	<u>1971</u>	<u>change 1971</u>
	<u>million pounds</u>		<u>Percent</u>
Lima beans	127.0	95.5	-25
Snap beans	141.0	120.1	-15
Sweet corn	277.0	204.4	-26
Green peas	235.9	205.6	-13
Spinach	26.7	32.1	+20
Total	807.6	657.7	-19

* Preliminary

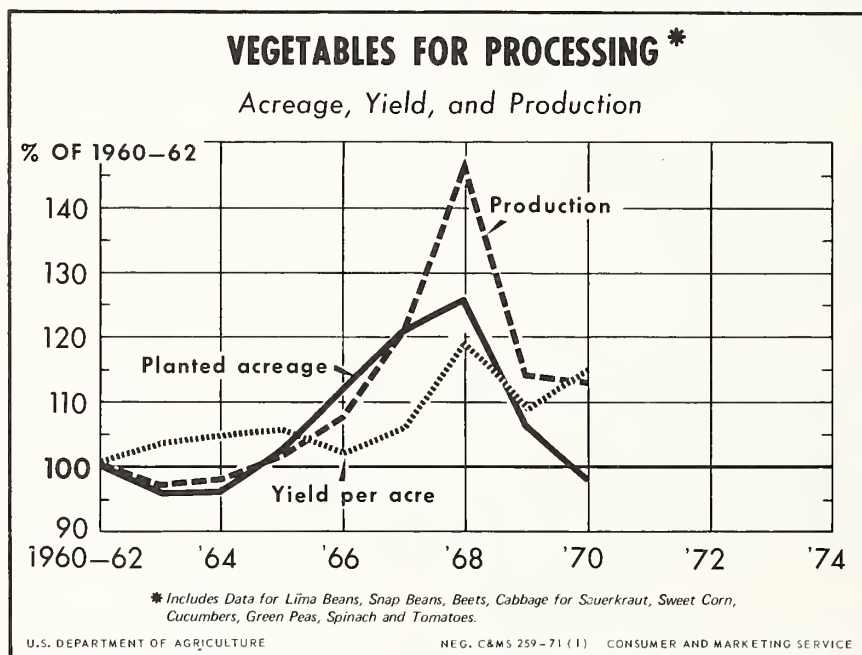


Figure 1

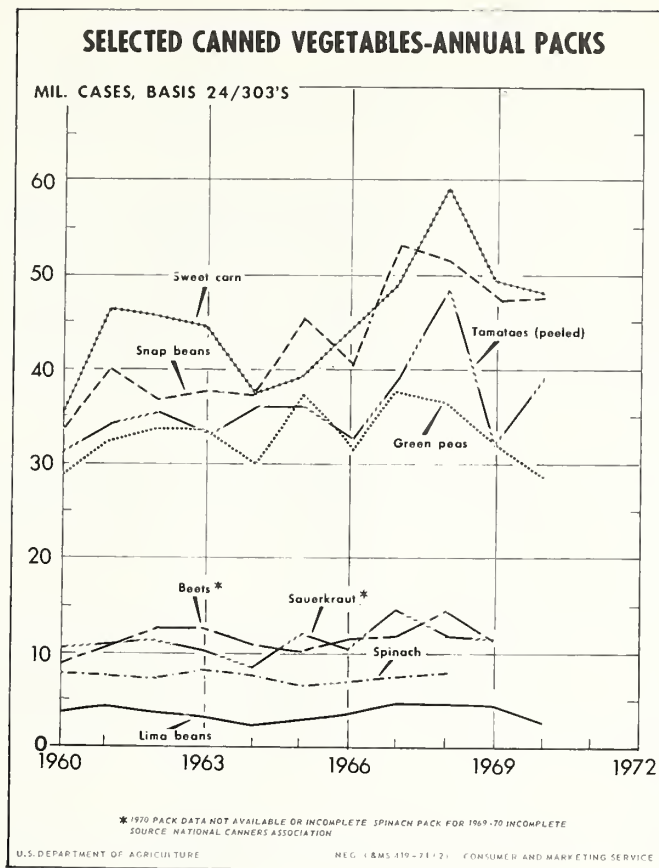


Figure 2

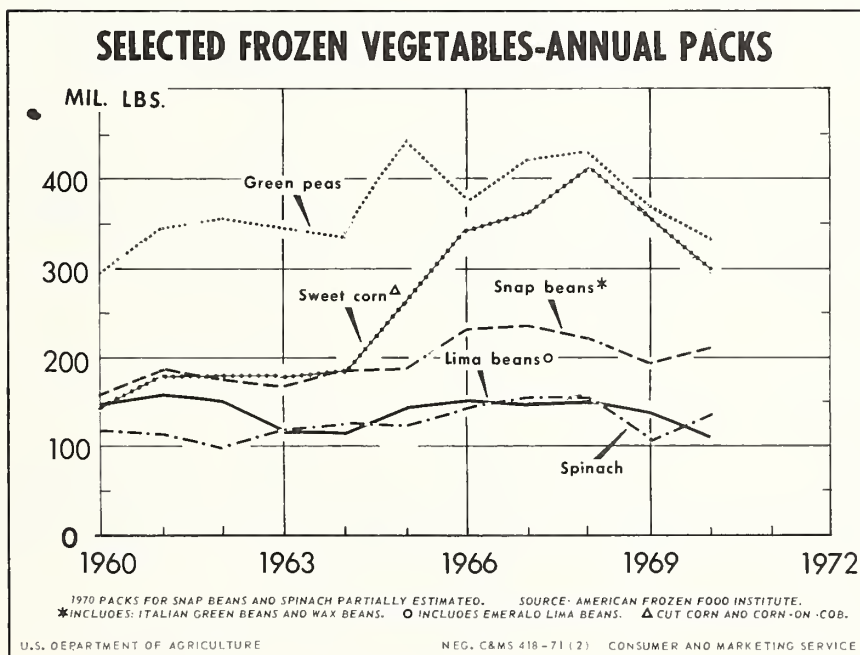


Figure 3

VI. FOREIGN TRADE IN PROCESSED VEGETABLES

Foreign trade in processed vegetables accounts for only a nominal percentage of the total domestic pack. Trade in canned vegetables is far greater than that in frozen vegetables.

During the 1960's, exports of canned asparagus declined sharply, but sweet corn showed a sustained uptrend. Processed tomatoes, however, continue to lead in foreign trade volume. As shown in Table 2, imports of processed tomatoes exceed exports. Most imports of processed tomatoes originate in the Mediterranean area. And there has been a growing volume from Mexico. Processed tomato exports move largely to Canada, although recipient countries include those in Europe and Asia.

Frozen vegetable exports in 1969 amounted to 25.6 million pounds compared with 27.1 million in 1968. Principal export markets for frozen vegetables are Canada, United Kingdom, Australia, Sweden, Bermuda, and the Bahamas.

Table 2.--Selected Canned Vegetables: Imports and exports

Commodity	Marketing Season			
	1969/70	1968/69	1967/68	1966/67
	1,000 cases (basis 24/303's)			
<u>Imports</u>				
Peas <u>1/</u>	449.6	294.0	239.9	154.7
Tomatoes <u>2/</u>	4,652.3	4,882.3	6,583.7	4,647.9
Tomato Concentrates <u>2/</u>	3,505.0	5,342.7	7,292.1	3,290.6
<u>Exports</u>				
Asparagus <u>3/</u>	479.3	613.8	668.6	1,318.0
Beans, Green <u>2/</u>	301.9	176.6	154.0	187.0
Corn, Sweet <u>4/</u>	719.4	611.3	516.6	662.9
Peas, Green <u>1/</u>	182.6	260.4	240.7	244.9
Tomatoes <u>2/</u>	743.1	421.0	275.4	447.5
Tomato Concentrates <u>2/</u>	905.3	442.3	343.0	414.8
Tomato Juice <u>2/</u>	489.5	567.5	720.1	800.0

Note: For import-export data recorded originally in pounds, a case equivalent of 24/303's is assumed to be 24 pounds.

1/ Year beginning June 1. 2/ Year beginning July 1. 3/ Year beginning April 1. 4/ Year beginning August 1.

Source: Bureau of the Census, U. S. Department of Commerce.

VII. DEMAND FOR FRESH AND PROCESSED VEGETABLES

The economy in 1971 is poised to recover from the 1969/70 slowdown. With productivity improving, credit easing, and price increases slowing in some sectors, consumers and certain investors may strengthen their spending during the new year. Barring a prolonged steel strike, this expansion, coupled with larger Federal, State, and local expenditures in fiscal 1972, should be under-way during the second half of the year.

Housing is expected to lead the 1971 recovery as more funds become available to the mortgage market. State and local Government expenditures, exports, and inventory investment are good bets to share in a general advance throughout the year. Recent liberalization of depreciation allowances should aid business investment in new plant and equipment. A number of industries may expand facilities to overcome energy and transportation shortages and to merchandise innovations now being created. Moreover, rising wage rates, some further reduction in taxes, and increased social and welfare payments will lead to further gains in after-tax incomes despite lingering unemployment.

The total market requirements for fresh and processed vegetables are expected to show an uptrend. The market expansion likely will occur due to growth in population and gains in net disposable income of consumers. In the past decade, there has been some shift in demand from fresh to processed vegetables (see Table below). This shift is expected to continue. The per capita use of frozen vegetables is expected to show a sustained upward trend. At the same time, use of canned vegetables is expected to expand, but aggregate use of fresh vegetables likely will decline.

Changes in consumption since 1960 for selected vegetables are shown in Figures 4-7. The figures show a decline in fresh consumption for nine of twelve principal vegetables; increases were recorded for cucumbers, peppers and lettuce. Increases in consumption were estimated for ten of twelve processed vegetables; the exceptions were peas and lima beans.

Year	: Total per capita use : fresh and processed*	:	Fresh use *	:	Processed*		
					Total	Canned	Frozen
	Pounds		Pounds		Pounds	Pounds	Pounds
1960	202.4		105.8		96.6	81.7	14.9
1969	213.9		98.1		115.8	96.3	19.5
1970 prel.	210.4		98.7		111.7	92.0	19.7

* Fresh weight basis.

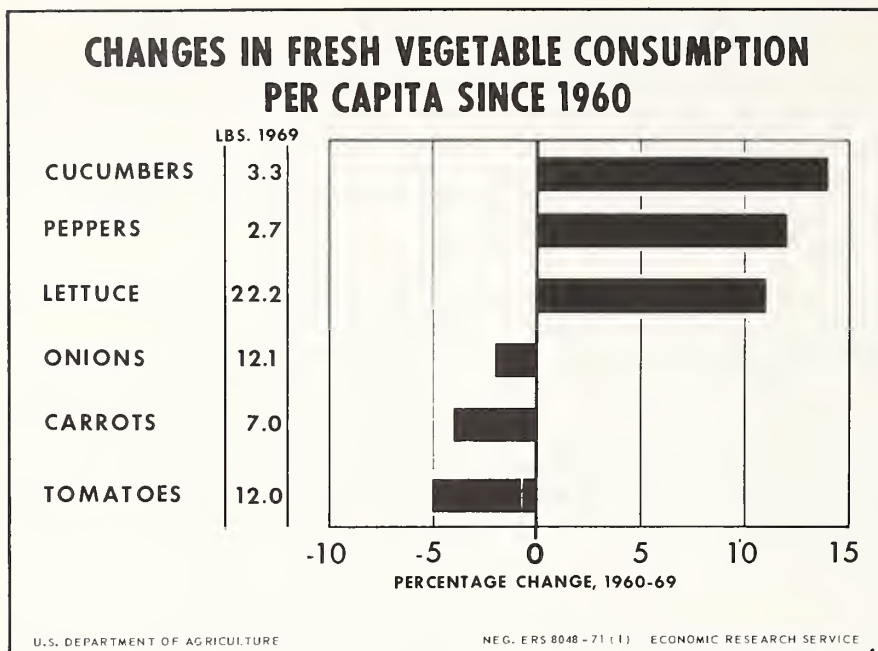


Figure 4

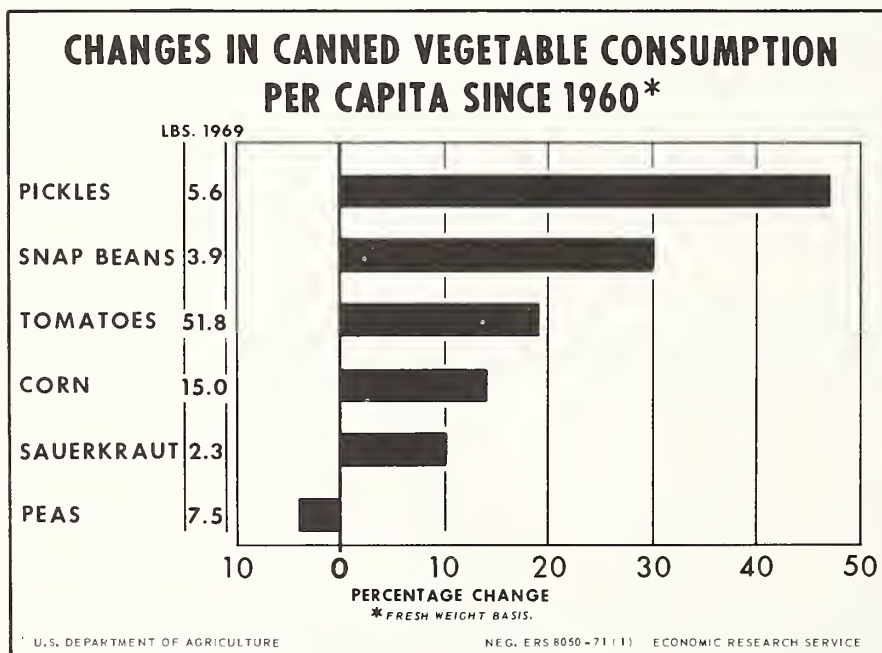


Figure 5

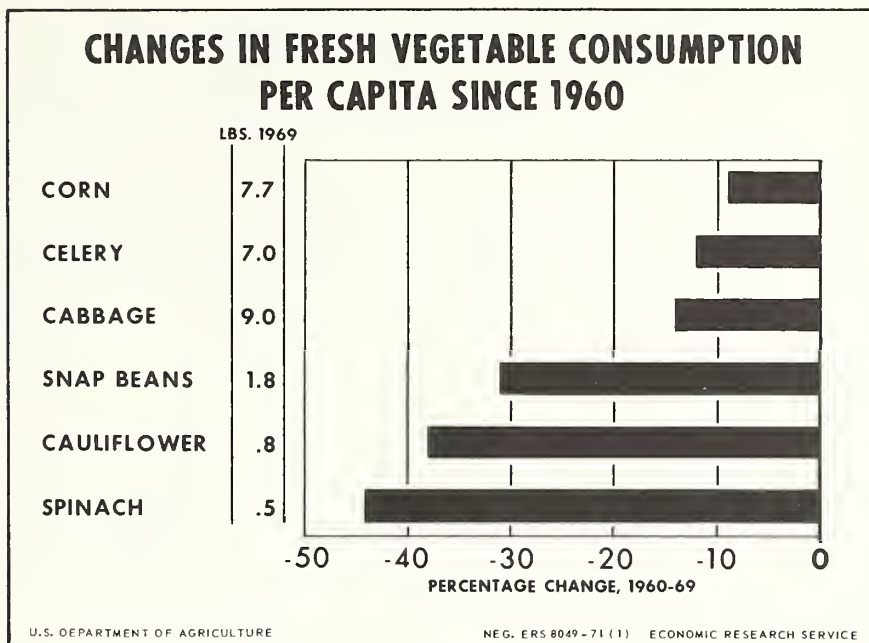


Figure 6

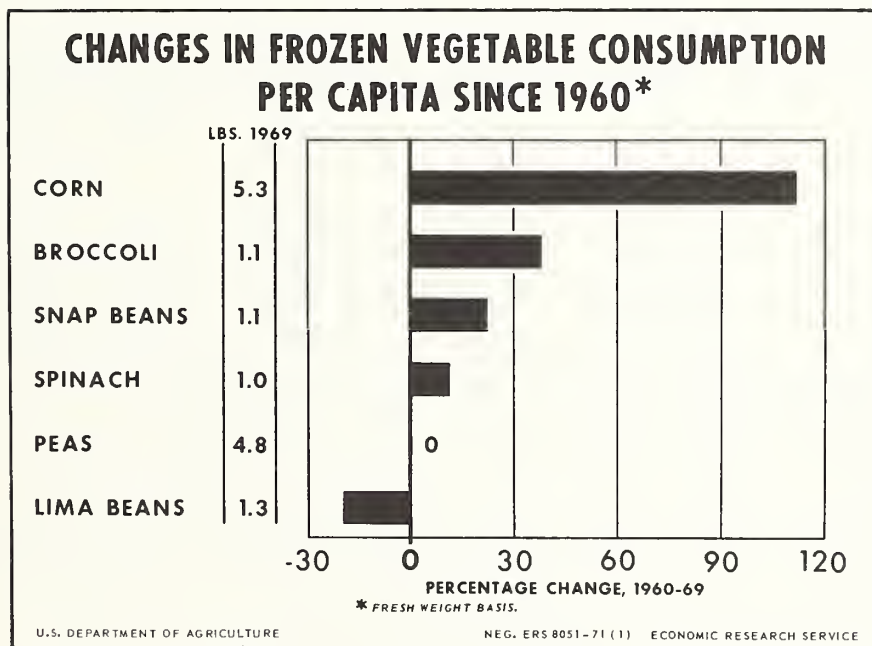


Figure 7

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Lima Beans

Year	: Acreage : :Planted:For harvest:	Yield : per acre	: :Production:	: Price :	: Value
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)
<u>1971 Planted Acreage Guide</u> <u>and probable production</u>					
Canning (planted acreage 15 percent more than in 1970)	31.2	<u>1/</u> .94	27.5		
Freezing (planted acreage 25 percent more than in 1970)	<u>57.9</u>	<u>1/1.27</u>	<u>69.1</u>		
Total	89.1		96.6		
<u>Background statistics</u>					
<u>Canning</u>					
1970	27.1	26.0	.90	23.4	156.00 3,658
1969	31.6	29.2	.98	28.6	148.00 4,226
1968	38.2	35.8	.89	31.8	167.00 5,319
1967	39.9	36.4	.98	35.5	164.00 5,832
<u>Freezing</u>					
1970	46.3	43.6	1.24	54.0	195.00 10,540
1969	57.4	53.9	1.30	70.0	192.00 13,433
1968	72.4	68.9	1.21	83.5	204.00 17,041
1967	65.6	60.9	1.32	80.2	183.00 14,711
<u>Total</u>					
1970	73.4	69.6	1.11	77.4	183.00 14,198
1969	88.9	83.2	1.19	98.7	179.00 17,659
1968	110.6	104.7	1.10	115.3	194.00 22,360
1967	105.5	97.3	1.19	115.7	178.00 20,543

1/ 1969-70 average yield.

Comments

The total acreage of green lima beans for processing has shown successive declines since 1967. The 1970 total acreage was nearly a fifth less than in 1969. All principal producing States except Delaware contributed to the reduction.

Extremes in moisture and temperatures resulted in a below-average yield, and production was 22 percent less than in 1969. In California, the leading source, the 1970 output was down nearly a fourth, and the Maryland crop was 50 percent less. As is usual, the bulk--70 percent--of the 1970 crop was utilized by freezers while canners absorbed 30 percent.

In 1970, carryovers of canned and frozen lima beans were relatively high, but packs were below average. Consequently, 1970/71 processed supplies show an improved balance compared with the recent 2 seasons. Prices for frozen lima beans approximate those last season. However, prices for canned lima beans are higher.

Canned Lima Beans

The 1970 carryover of canned lima beans matched the large total of a year earlier. However, the 1970 pack was relatively small. The 1970/71 total supply was estimated at 4.6 million cases, basis 24/303's, 15 percent less than the 5.4 million cases last season.

This season through January 1, canners reported that cumulative shipments approximated the total of a year earlier. Also, on January 1, canners' stocks were 20 percent less than a year ago. Cumulative shipments of 24/303's exceeded last year's volume but movement of 6/10's was substantially less. List prices for 24/303's are moderately higher than those reported by the trade last winter, but prices for 6/10's are slightly lower.

Assuming a normal rate in shipments in coming months, the 1971 carryover of canned lima beans will be relatively small. Therefore, an increase is recommended in 1971 production for canning.

1971 Guide - Canning

The 1971 guide is a planted acreage 15 percent more than in 1970. Such an acreage, with normal abandonment and a 1969-70 average yield, will result in a production 18 percent more than in 1970.

Frozen Lima Beans

Although the 1970 carryover of frozen lima beans was large, the 1970 pack was a fifth less than in 1969, and the smallest since 1951. The 1970/71 supply was estimated at 175 million pounds, 16 percent less than that last season.

Into midwinter, this season's disappearance of frozen snap beans was running about at last season's level. And on January 31, 1971, cold storage holdings of frozen lima beans were a fourth less than a year earlier. Consequently, assuming a normal movement in the coming months, the 1971 carryover will be small. And an expanded output is recommended in 1971 production for freezing.

1971 Guide-Freezing

The 1971 guide is a planted acreage 25 percent more than in 1970. Such an acreage, with normal abandonment and a 1969-70 average yield, will result in a production 28 percent more than in 1970. Data on processed lima beans are shown in Figures 8 and 9.

Supply and Disappearance of Processed Lima Beans

Commodity	Marketing Season				
	: 1970-71	: 1969-70	: 1968-69	: 1967-68	: 1966-67

Canned Lima Beans

Million cases (basis 24/303's)

Carryover	1.8	1.8	1.5	.8	.6
Pack	2.8	3.6	3.8	4.0	3.5
Total Supply	4.6	5.4	5.3	4.8	4.1
Disappearance	N.A.	3.6	3.5	3.3	3.3
Carryover	N.A.	1.8	1.8	1.5	.8

Frozen Lima Beans

Million pounds

Carryover	62.5	66.2	50.7	31.6	24.7
Pack	112.6	142.6	165.5	161.3	151.9
Total Supply	175.1	208.8	216.2	192.9	176.6
Disappearance	N.A.	146.3	150.0	142.2	145.0
Carryover	N.A.	62.5	66.2	50.7	31.6

N.A. - Not available.

Sources: National Cannery Association; American Institute of Frozen Food Packers; Bureau of the Census, U. S. Department of Commerce, and Statistical Reporting Service, USDA.

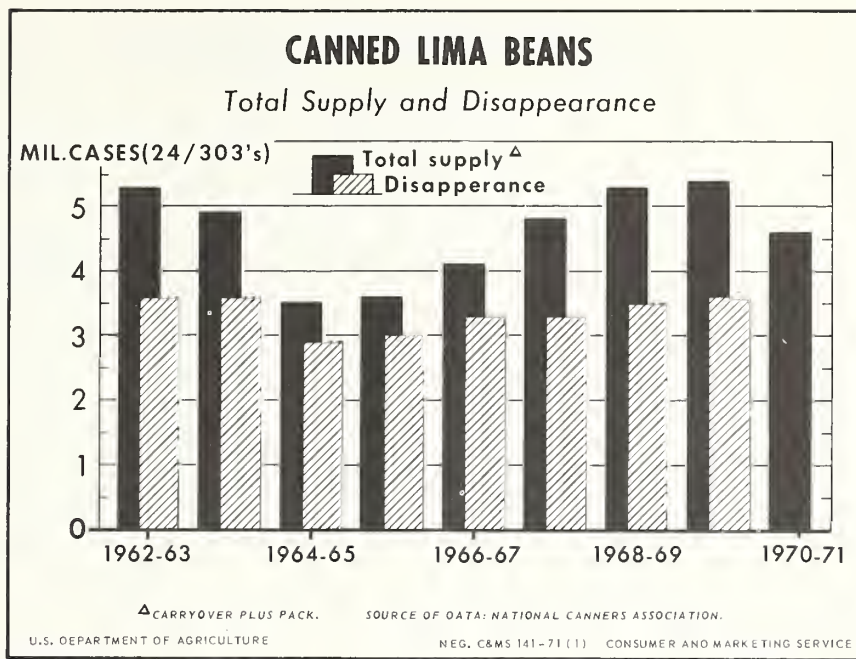


Figure 8

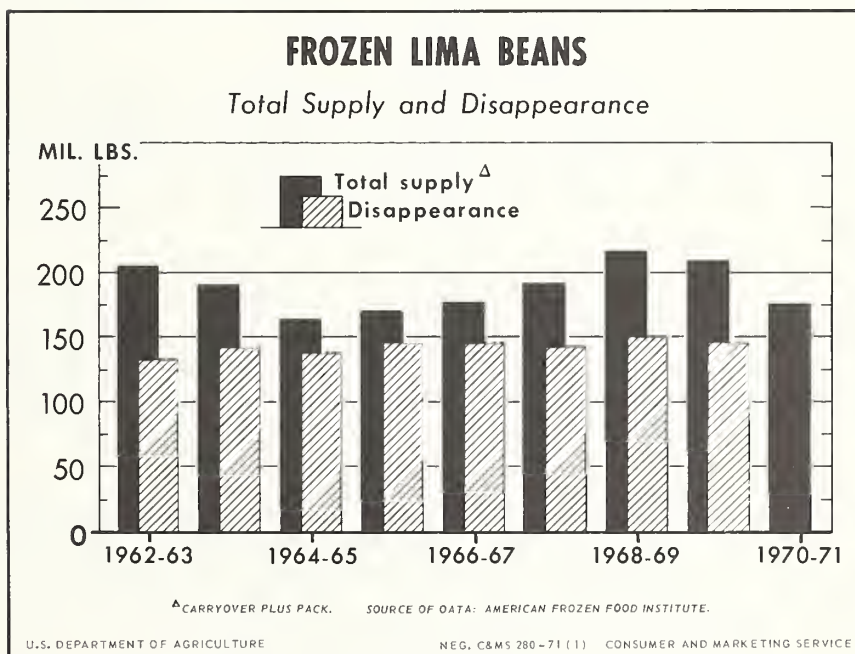


Figure 9

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Snap Beans

Year	: Acreage	: Yield	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	Value
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)

1971 Planted Acreage Guide
and probable production

Canning (planted acreage 10 per-
cent more than in 1970) 209.1 1/ 2.39 469.9

Freezing (planted acreage 10 per-
cent more than in 1970) 57.0 1/ 2.49 133.5
Total 266.1 603.4

Background statistics

Canning

1970	190.1	178.7	2.45	437.8	93.70	41,032
1969	200.3	191.0	2.38	453.8	98.80	44,855
1968	222.7	207.2	2.34	484.6	99.00	47,976
1967	222.0	208.5	2.34	486.8	98.80	48,110

Freezing

1970	51.8	49.6	2.66	131.8	101.00	13,331
1969	50.5	47.2	2.43	114.6	102.00	11,710
1968	63.2	59.9	2.37	142.0	103.00	14,587
1967	71.5	65.6	2.29	150.0	111.00	16,616

Total

1970	242.0	228.3	2.50	569.6	95.40	54,363
1969	250.8	238.3	2.39	568.4	99.50	56,565
1968	285.9	267.1	2.35	626.7	99.80	62,563
1967	293.5	274.0	2.32	636.8	102.00	64,726

1/ 1968-70 average yield.

Comments

Following the 1967 peak, total acreage of snap beans for processing showed successive declines in the recent 3 seasons. The 1970 acreage was 4 percent less than in 1969. The reduction was concentrated in western acreage for canning.

As usual, yield levels in producing areas varied widely. But the U. S. average was high. Total production was slightly more than in 1969, but well below the 1967 record. Compared with a year earlier, 1970 production for freezing was 15 percent more, while canning tonnage was 4 percent less.

Inventories of canned and frozen snap beans this season are in a much improved balance with markets needs compared with the almost excessive holdings

in 1968/69 and 1969/70. Price levels for both green and wax canned snap beans are substantially higher than the relatively low levels of last season. Prices for frozen beans match last season's levels. The disappearance of processed snap beans is expected to continue at a high rate. If so, 1971 carryovers of canned and frozen supplies will be below average. Data on processed snap beans are shown in Figures 10 and 11.

Snap Beans - Canned

The 1970 carryover was almost a fifth below the 1969 record total but the 1970 pack was slightly larger than a year earlier. The 1970/71 total supply (carryover plus pack) was indicated at 61.8 million cases, basis 24/303's, 2.6 million less than a year earlier. Into midwinter, cumulative shipments of wax beans were well ahead of the year-earlier total, and green bean movement was up slightly. The 1970/71 total disappearance of canned snap beans will be high, if initial movement trends are sustained for the remainder of the season. The 1971 canned carryover is expected to be relatively low. Therefore in 1971, a larger acreage will be required to furnish adequate raw product for the 1971 canned pack.

1971 Guide - Canning

The 1971 guide is a planted acreage 10 percent more than in 1970. Such an acreage, with normal abandonment and a 1968-70 average yield, will result in a production 7 percent more than in 1970.

Snap Beans - Frozen

The 1970 carryover was substantially less than in the two previous seasons, and the 1970 pack was the smallest since 1965. The 1970/71 supply (carryover plus pack) was approximately 273.5 million pounds, 5 percent less than a year earlier.

Into midwinter, disappearance of frozen snap beans was running at a record rate. On January 31, 1971 cold storage holdings of frozen beans were estimated at 120.1 million pounds, about 21 million pounds less than a year earlier. In the coming months, disappearance is expected to continue at a high level and the 1971 carryover likely will be small. Therefore for adequate supplies in 1971/72, an increase will be required in snap bean acreage for freezing.

1971 Guide - Freezing

The 1971 guide is a planted acreage 10 percent more than in 1970. Such an acreage, with normal abandonment and a 1968-70 average yield, will result in a production one percent more than in 1970.

Supply and Disappearance of Processed Snap Beans

Commodity	Marketing Season				
	: 1970-71	: 1969-70	: 1968-69	: 1967-68	: 1966-67

Canned Snap Beans

Million cases (basis 24/303's)

Carryover	14.2	17.1	15.1	7.8	10.4
Pack	47.6	47.3	51.8	53.2	40.5
Total Supply	61.8	64.4	66.9	61.0	50.9
Disappearance	N.A.	50.2	49.8	45.9	43.1
Carryover	N.A.	14.2	17.1	15.1	7.8

Frozen Snap Beans

Million pounds

Carryover	62.5	90.1	78.7	48.2	40.6
Pack	211.0**	197.8	221.5	237.8	231.8
Total Supply	273.5**	287.9	300.2	286.0	272.4
Disappearance	N.A.	225.4	210.1	207.3	224.2
Carryover	N.A.	62.5	90.1	78.7	48.2

** Partially estimated.

N.A. - Not available.

Sources: National Canners Association; American Frozen Food Institute;
Bureau of the Census, U. S. Department of Commerce; and the
Statistical Reporting Service, USDA.

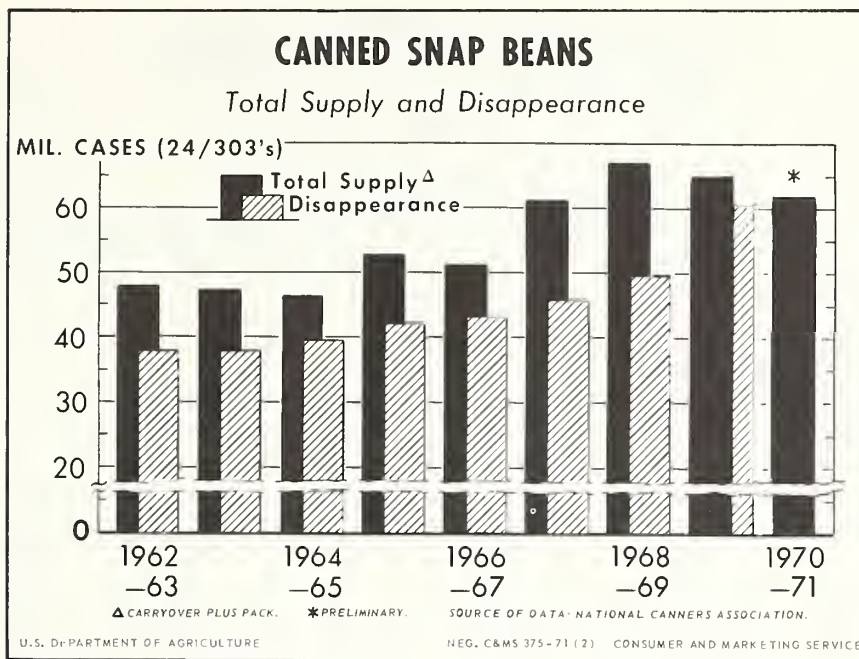


Figure 10

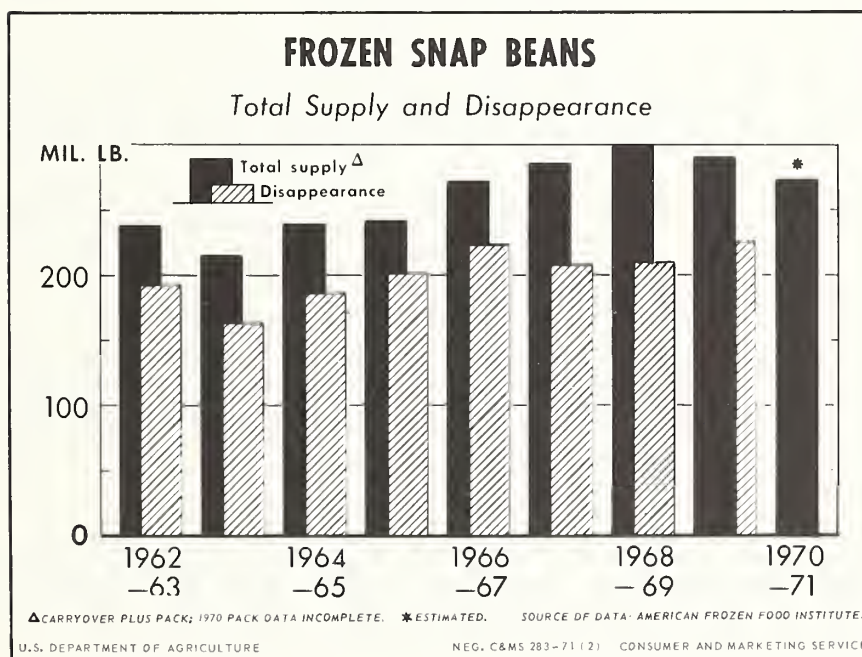


Figure 11

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Beets

Year	: Acreage	: Yield	:	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	: Value	
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)	
<u>1971 Planted Acreage Guide</u> <u>and probable production</u>						
Canning (planted acreage equal to 1970)	16.6	<u>1</u> / 12.9	198.7			
<u>Background statistics</u>						
<u>Canning</u>						
1970	16.6	15.1	13.7	207.1	21.30	4,412
1969	19.1	17.9	12.2	219.6	22.00	4,831
1968	22.1	21.2	12.7	269.2	23.80	6,394
1967	19.5	17.6	11.7	206.4	20.50	4,226

1/ 1968-70 average yield.

Comments

The 1970 acreage of beets for canning was the smallest in 5 years and 13 percent less than in 1969. Plantings were reduced in all principal producing States.

The reduction was partly offset by a record average yield (Figure 12), and production was 6 percent less than a year earlier. In New York, the leading source, a high yield resulted in 14 percent increases in output.

The 1970 carryover of canned beets was moderately less than the 1969 high total. As of January 1, 1971, canners reported that the 1970 cumulative pack was slightly larger than a year earlier. As a result, the 1970/71 supply (carryover plus pack) matched that in 1969/70.

This season, prices for canned beets are moderately higher than in 1969/70. In spite of higher prices, canners report that cumulative shipments to January 1, 1971 exceeded the 1969/70 volume by 9 percent. Canners' stocks on January 1, 1971 were 8.9 million cases, basis 24/303's compared with 9.5 million on January 1, 1970.

Assuming normal disappearance in the coming months, the 1971 carryover of canned beets will approximate the 1967-70 average. Therefore with average yields in 1971, an equal acreage would provide an adequate production for 1971 pack requirements.

1971 Guide

The 1971 guide is a planted acreage equal to 1970. Such an acreage, with normal abandonment and a 1968-70 average yield, will result in a production 4 percent less than in 1970.

Supply and Disappearance of Canned Beets

Commodity	Marketing Season				
	1970-71	1969-70	1968-69	1967-68	1966-67
Canned Beets					
	Million cases (basis 24/303's)				
Carryover	5.4	5.9	3.6	3.3	3.2
Pack	11.8**	11.3	14.6	11.8	11.4
Total Supply	17.2**	17.2	18.2	15.1	14.6
Disappearance	N.A.	11.8	12.3	11.5	11.3
Carryover	N.A.	5.4	5.9	3.6	3.3

** Partially estimated. N.A. - Not available.

Sources: National Canners Association; and Bureau of the Census, U. S. Department of Commerce.

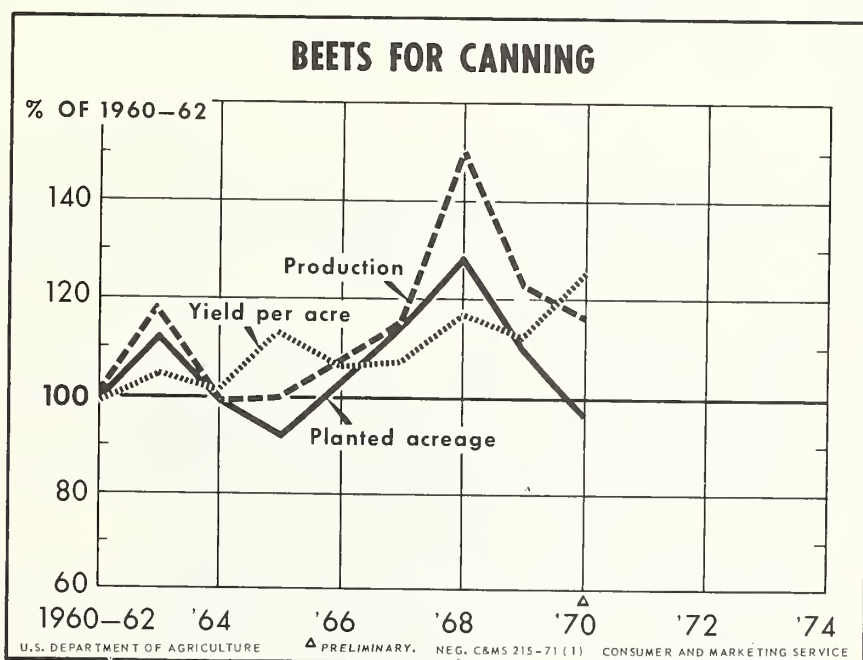


Figure 12

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cabbage-Early Fall
(Fresh Market and Processing)

Year	: Acreage	: Yield	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	Value
	(1,000 acres)	(Cwt.)	(1,000 cwt.)	(\$ per cwt.)	(\$1,000)

1971 Planted Acreage Guide
and probable production
(planted acreage 5 percent
less than in 1970)

32.2 30.6 1/ 303 9,266

Background statistics

1970	33.9	31.2	314	2/ 9,800	1.97	18,864
1969	32.0	30.7	285	2/ 8,745	2.79	23,794
1968	31.5	30.2	305	2/ 9,203	2.22	20,046
1967 3/	32.8	31.0	307	2/ 9,526	1.60	15,204

1/ 1967-70 average yield.

2/ Includes some quantities of early fall storage cabbage in Upstate New York, harvested but not sold because of shrinkage and waste (in 1,000 cwt.): 202 in 1970, 202 in 1969, 191 in 1968 and 200 in 1967.

3/ Early summer crop data for Massachusetts, Rhode Island and Connecticut included with early fall.

Comments

The 1970 early fall cabbage acreage for fresh market and processing was moderately more than in 1969. High prices during the preceding fall, and light sauerkraut supplies contributed to increased acreages in most producing States. Because of the short-supply position for sauerkraut, the 1970 acreage contracted by processors, at 11,780 acres, was up 8 percent.

The 1970 early fall cabbage production, the major source for cabbage for sauerkraut, was 12 percent larger than the moderate 1969 output. Although dry weather during August slowed growth in Upstate New York and in the Midwest, favorable fall weather and timely rains resulted in a considerable late-season gain in tonnage. Record yields were reported in Upstate New York, Ohio, and Wisconsin.

The 1970/71 sauerkraut supply is up substantially from the moderate total of last season. Although the 1970 carryover was small, cabbage cuttings for kraut during the last half of 1970 were 15 percent more than a year earlier. On December 1, 1970, packers' holding were well above comparable levels in both 1968 and 1969 (Figure 13). Nevertheless, sauerkraut prices are about equal to those of last season, according to trade reports.

Into late winter, cumulative shipments of sauerkraut were running moderately above those last season. And 1970/71 total disappearance is expected to exceed that in 1969/70.

1971 Guide

The 1971 guide is a planted acreage 5 percent less than in 1970. Such an acreage, with normal abandonment and a 1967-70 average yield, will result in a production 5 percent less than in 1970.

Supply and Disappearance of Sauerkraut

Commodity	Marketing Season				
	1970-71	1969-70	1968-69	1967-68	1966-67

Sauerkraut

Million cases (basis 24/303's)

Carryover	3.2	3.4	4.0	2.3	3.1
Pack	13.4*	11.7	11.9	14.5	10.4
Total Supply	16.6*	15.1	15.9	16.8	13.6
Disappearance	N.A.	11.9	12.5	12.8	11.3
Carryover	N.A.	3.2	3.4	4.0	2.3

* Partially estimated. N.A. - Not available.

Sources: National Kraut Packers Association, and Bureau of the Census, U. S. Department of Commerce.

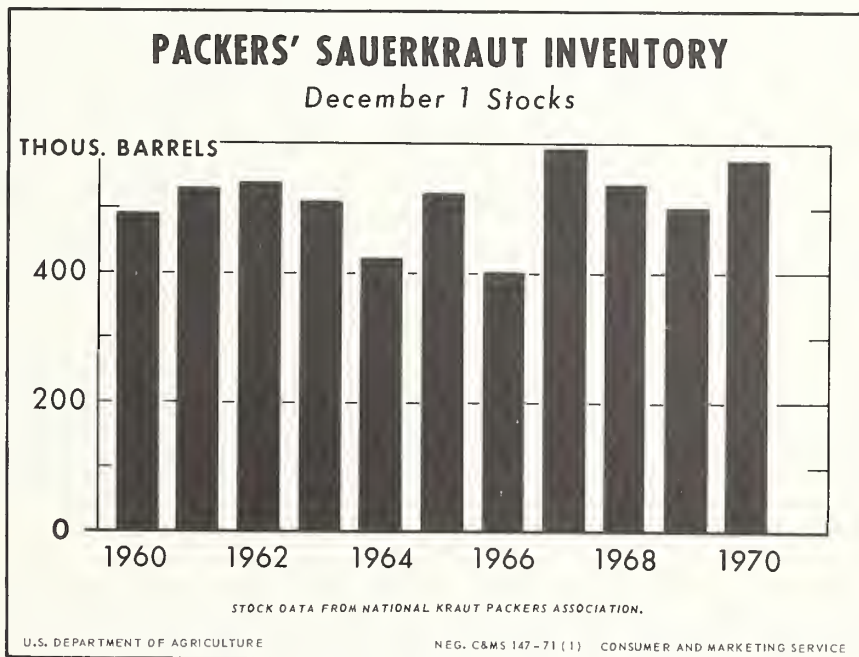


Figure 13

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Sweet Corn

Year	: Acreage	: Yield	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	Value
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)

1971 Planted Acreage Guide
and probable production

Canning (acreage 5 per-
cent more than in 1970) 349.2 1/ 4.43 1,469.9

Freezing (acreage 15 per-
cent more than in 1970) 108.6 1/ 5.44 560.9
Total 457.8 2,030.8

Background statistics

Canning

1970	332.6	320.4	4.37	1,399.2	23.30	32,579
1969	347.4	334.6	4.37	1,462.2	23.90	34,966
1968	416.7	393.0	4.56	1,792.6	24.40	43,725
1967	381.5	352.6	4.30	1,515.6	23.60	35,833

Freezing

1970	94.4	90.5	5.21	471.8	25.80	12,157
1969	118.1	114.1	5.67	647.1	27.80	18,017
1968	137.0	126.2	5.44	686.7	28.70	19,680
1967	129.3	118.0	4.97	586.3	28.50	16,708

Total

1970	427.0	411.0	4.55	1,871.1	23.90	44,736
1969	465.4	448.7	4.70	2,109.4	25.10	52,983
1968	553.7	519.2	4.78	2,479.3	25.60	63,405
1967	510.8	470.6	4.47	2,101.9	25.00	52,541

1/ 1968-70 average.

Comments

The acreage of sweet corn for processing was reduced 8 percent in 1970. The reduction was concentrated in western acreage for freezing. Cold, wet weather slowed planting, and many areas reported below normal rainfall during the growing season. Average yields in 1970 ranged from high in Delaware to low in Illinois and Washington.

The 1970 total production was 11 percent less than in 1969. Production for canning was 4 percent less, and freezing, 27 percent less. Output in Washington and Illinois was down 45 percent and 24 percent, respectively. Also, Oregon's tonnage was down 21 percent. The 1970 combined production in Minnesota and Wisconsin, the leading sources, was about equal to 1969.

As a result of the smaller production, the 1970 canned pack was reduced moderately compared with a year earlier and the frozen pack was down almost a fifth. Compared with the two previous seasons, the 1970/71 supplies of canned and frozen sweet corn are in much better balance with market needs and prices for both canned and frozen sweet corn are holding at higher levels than last winter. Data on processed sweet corn are shown in Figures 14, 15 and 16.

Canned Sweet Corn

The 1970 carryover was 8 percent less than the 1969 record, and the 1970 pack, basis 24/303's, was 47.0 million cases, about 2.4 million below 1969. The 1970/71 total supply was estimated at 60.4 million cases, 6 percent less than last season's 64.0 million.

Disappearance so far this season has matched last season's moderate rate. And on January 1, 1971 total stocks held by canners were down moderately from a year earlier. During the last half of the 1970/71 season, shipments are expected to continue high as competitive supplies of frozen sweet corn are light. This may result in some shift in demand to the canned product. Therefore, the 1971 carryover of canned sweet corn is expected to total at least moderately less than in 1970.

1971 Guide - Canning

The 1971 guide is a planted acreage 5 percent more than in 1970. Such an acreage, with normal abandonment and a 1968-70 average yield, will result in a production 5 percent more than in 1970.

Frozen Sweet Corn (Cut corn and corn-on-cob)

The 1970 carryover of frozen sweet corn was a record, and slightly above 1969. The 1970 pack was about a fifth less than in 1969, and the smallest since 1965. The total supply for 1970/71 marketing was estimated at 407.0 million pounds, 14 percent less than last season's 473.8 million.

Although frozen sweet corn prices this season are much improved compared with 1969/70, cumulative disappearance has been at a relatively high rate. The 1971 carryover is expected to be small. Consequently, the 1971 acreage for freezing should be increased substantially.

1971 Guide - Freezing

The 1971 guide for freezing is a planted acreage 15 percent more than in 1970. Such an acreage, with normal abandonment and a 1968-70 average yield, will result in a production 19 percent more than in 1970.

Supply and Disappearance of Processed Sweet Corn

Commodity	Marketing Season				
	1970-71	1969-70	1968-69	1967-68	1966-67

Canned Sweet Corn

Million cases (basis 24/303's)

Carryover	13.4	14.6	8.0	4.5	4.1
Pack	47.0	49.4	59.3	49.3	45.5
Total Supply	60.4	64.0	67.3	53.8	49.6
Disappearance	N.A.	50.6	52.7	45.8	45.1
Carryover	N.A.	13.4	14.6	8.0	4.5

Frozen Sweet Corn

Million pounds

Carryover	112.4	110.6	67.7	46.1	30.1
Pack	294.6	363.2	410.9	360.1	344.4
Total Supply	407.0	473.8	478.6	406.2	374.5
Disappearance	N.A.	361.4	368.0	338.5	328.4
Carryover	N.A.	112.4	110.6	67.7	46.1

N.A. - Not available.

Source: National Canners Association; Bureau of the Census, U. S. Department of Commerce; American Frozen Food Institute; and Statistical Reporting Service, USDA.

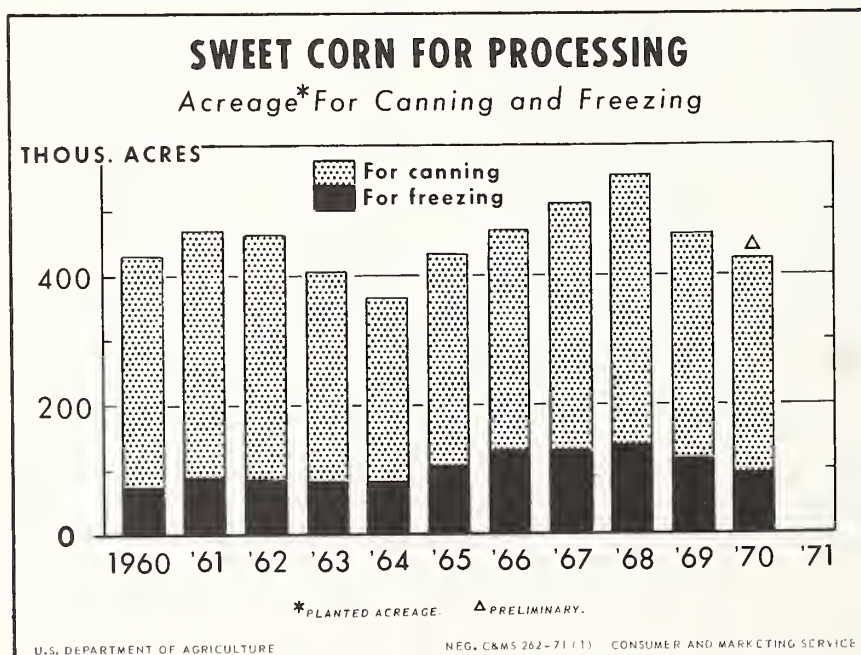


Figure 14

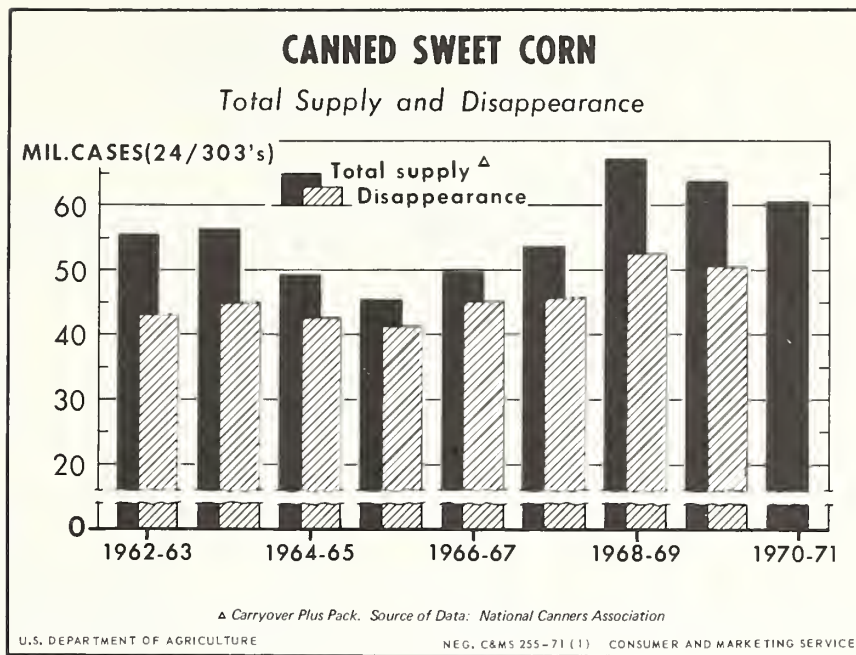


Figure 15

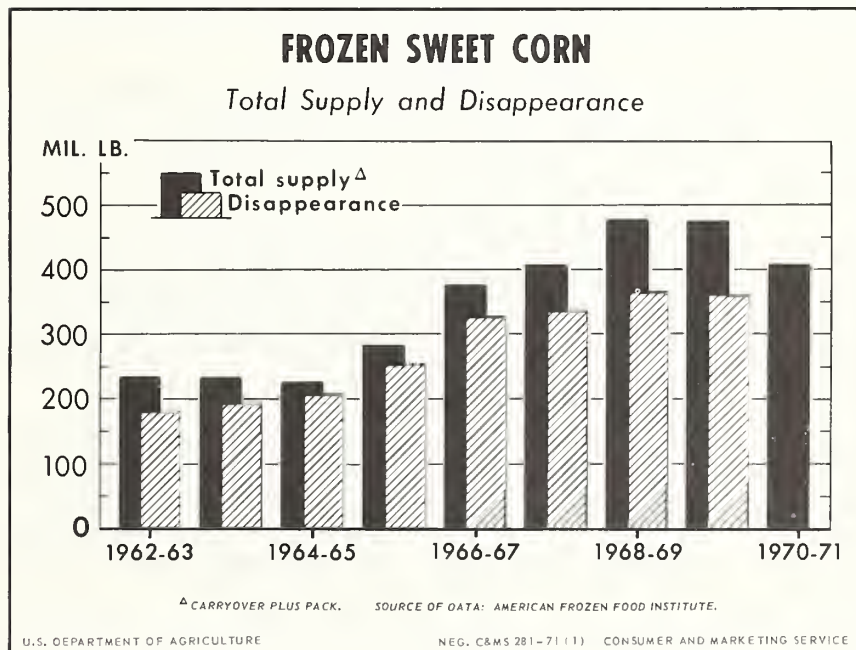


Figure 16

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Cucumbers for Pickles

Year	: Acreage	: Yield	:	:	:	:
	:Planted:For harvest: per acre :Production: Price : Value					
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)	

1971 Planted Acreage Guide
and probable production
(planted acreage equal
to 1970)

142.5 1/ 4.12 546.0

Background statistics

Canning

1970	142.5	135.5	4.35	588.8	94.20	55,443
1969	140.3	129.7	3.88	503.1	91.50	46,034
1968	159.9	144.8	3.83	554.6	92.20	51,143
1967	165.3	154.7	3.85	595.6	91.20	54,315

1/ 1969-70 average.

Comments

The 1970 planted acreage of cucumbers for pickles was increased slightly. As a result of a below-average acreage loss and a record yield, production was 17 percent above 1969, and almost matched the 1967 record output (Figure 17).

All principal producing States except North Carolina, Virginia, and Texas reported production increases. In Michigan, the leading source, output was up 20 percent. In South Carolina, acreage was increased sharply and a three-fold increase in production resulted.

On October 1, 1970, total cucumber pickle stocks from the crop of the previous year were relatively small. But stocks processed from the 1970 crop were about an eighth more. Consequently, on October 1, 1970 old and new crop cucumber pickle stocks combined were 7 percent above those a year earlier, but slightly less than the 1968 record total.

The 1970/71 consumption of cucumber pickles is expected to approximate the high totals reported in previous seasons. Consumption has shown a sharp upward trend, especially in the late 1960's, according to trade reports. Nevertheless, carryover stocks from the current season's inventory may be above average. Therefore, an equal acreage in 1971, assuming an average yield, should provide adequate raw product for next season's pack.

1971 Guide

The 1971 guide for cucumbers for pickles is a planted acreage equal to 1970. Such an acreage, with normal acreage loss and a 1969-70 average yield, will result in a production 7 percent less than in 1970.

Supply and Computed Disappearance of Cucumber Pickles

Item	Marketing season				
	1970/71	1969/70	1968/69	1967/68	1966/67
	1,000 tons				
October 1, stocks previous year	538.0	581.0	568.8	482.2	454.4
Production	588.8	503.1	554.6	595.6	534.0
Total supply	1,126.8	1,084.1	1,123.4	1,077.8	988.4
October 1, stocks current year	577.6*	538.0	581.0	568.8	482.2
Consumption 1/	N.A.	546.1	542.4	509.8	506.2

* Subject to revision. N.A. - Not available.

1/ Computed: October 1 stocks of previous year plus intake or production current year minus October 1 stocks current year.

Source: Statistical Reporting Service, USDA.

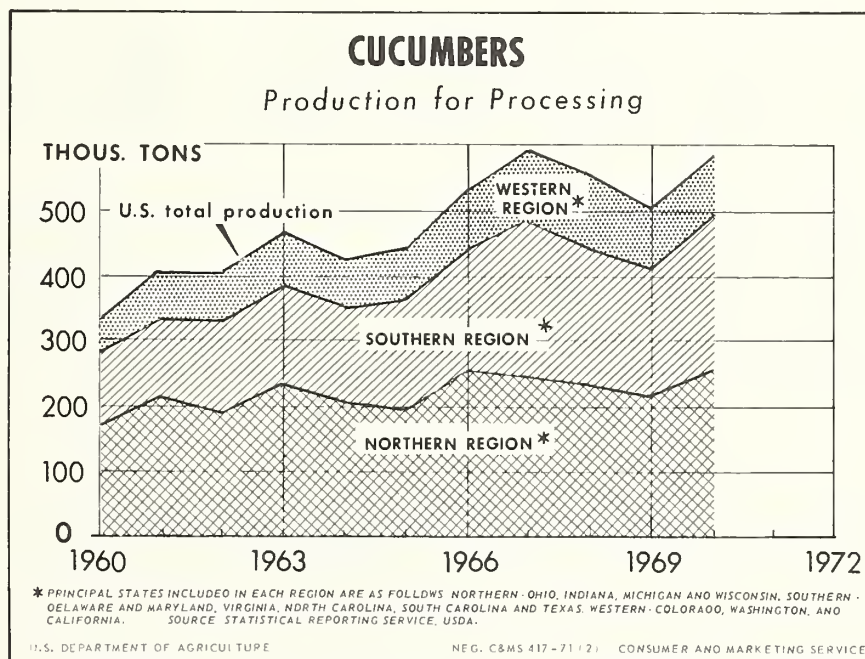


Figure 17

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Green Peas

Year	: Acreage	: Yield	:	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	: Value	
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)	
<u>1971 Planted Acreage Guide</u> <u>and probable production</u>						
Canning (planted acreage 15 per- cent more than in 1970)	305.2	<u>1/</u> 1.22		346.2		
Freezing (planted acreage 15 per- cent more than in 1970)	<u>163.0</u>	1.38		<u>207.0</u>		
Total	468.2			553.2		
<u>Background statistics</u>						
<u>Canning</u>						
1970	265.4	252.2	1.19	299.9	109.00	32,707
1969	280.3	255.4	1.24	316.4	107.00	34,012
1968	314.4	286.4	1.24	354.1	109.00	38,713
1967	315.0	298.4	1.22	363.2	111.00	40,422
<u>Freezing</u>						
1970	141.8	131.6	1.34	176.4	109.00	19,182
1969	161.0	148.8	1.40	208.0	104.00	21,687
1968	185.6	165.7	1.38	228.3	104.00	23,636
1967	172.2	159.8	1.42	227.3	105.00	23,852
<u>Total</u>						
1970	407.2	383.8	1.24	476.2	109.00	51,889
1969	441.3	404.2	1.30	524.4	106.00	55,699
1968	499.9	452.1	1.29	582.4	107.00	62,349
1967	487.2	458.2	1.29	590.6	109.00	64,274

1/ 1967-70 average.

Comments

The acreage of green peas for processing was reduced 8 percent and was the smallest since 1960. The reduction was concentrated in the West. Average yields were down a little compared with the three previous seasons. The 1970 production was 9 percent less than in 1969 and 18 percent below 1968. The 1970 outputs for freezing and canning were, respectively, 15 percent and 6 percent less than in 1969. Production in both Wisconsin and Minnesota, the leading sources, showed small change compared with a year earlier but Washington's tonnage was a fourth less.

The carryovers of canned and frozen green peas in 1970 were large. But with smaller packs, supplies for 1970/71 marketing were substantially less than in 1969/70. So far this season, cumulative shipments of frozen green peas have been holding at a high rate, but shipments of canned are down from those of a year earlier. Even so, the 1971 carryovers of processed green peas are expected to be below average. Processed supplies are shown in Figures 18 and 19.

Green Peas - Canned

Although the 1970 carryover was large, the 1970 pack was down 11 percent. The 1970/71 total supply was estimated at 38.0 million cases, basis 24/303's, 13 percent less than the 1969/70 total of 43.5 million cases. The cumulative shipments of canned green peas into midwinter this season are 12 percent less than in the comparable period of 1969/70. At the same time, prices have averaged higher.

Total shipments this season are expected to be moderately less than last season. Even so, the 1971 carryover will be small. Consequently, an increase is recommended in the 1971 total acreage for canning.

1971 Guide - Canning

The 1971 guide is a planted acreage 15 percent more than in 1970. Such an acreage, with normal abandonment and a 1967-70 average yield, will result in a production 15 percent more than in 1970.

Green Peas - Frozen

The carryover in 1970 was moderately less than the 1969 record, and the 1970 pack was 9 percent less. The 1970/71 total supply (carryover plus pack) was 470.5 million pounds, 9 percent less than the 514.3 million estimated for 1969/70.

Prices for frozen green peas this winter are holding well above those of last winter. Nevertheless, disappearance of supplies this season has been at a high level, and the 1971 carryover of frozen green peas is expected to be the smallest since 1961. In 1971, an increase in acreage is recommended to furnish adequate raw product for the frozen green pea market which utilizes over one million pounds daily.

1971 Guide - Freezing

The 1971 guide is a planted acreage 15 percent more than in 1970. Such an acreage, with normal abandonment and a 1967-70 average yield, will result in a production 17 percent more than in 1970.

Supply and Disappearance of Processed Green Peas

Commodity	Marketing Season				
	: 1970-71	: 1969-70	: 1968-69	: 1967-68	: 1966-67
<u>Canned Green Peas</u>		<u>Million cases (basis 24/303's)</u>			
Carryover	9.3	11.4	9.9	7.1	8.8
Pack	28.7	32.1	36.2	37.7	31.9
Total Supply	38.0	43.5	46.1	44.8	40.6
Disappearance	N.A.	34.1	34.7	34.9	33.5
Carryover	N.A.	9.3	11.4	9.9	7.1
<u>Frozen Green Peas</u>		<u>Million pounds</u>			
Carryover	136.7	147.0	124.3	100.5	115.0
Pack	333.8	367.3	429.4	424.2	375.4
Total Supply	470.5	514.3	553.7	524.7	490.3
Disappearance	N.A.	377.6	406.7	400.4	389.8
Carryover	N.A.	136.7	147.0	124.3	100.5

N.A. - Not available.

Source: National Cannery Association; American Frozen Food Institute; Bureau of the Census, U. S. Department of Commerce; and Statistical Reporting Service, USDA.

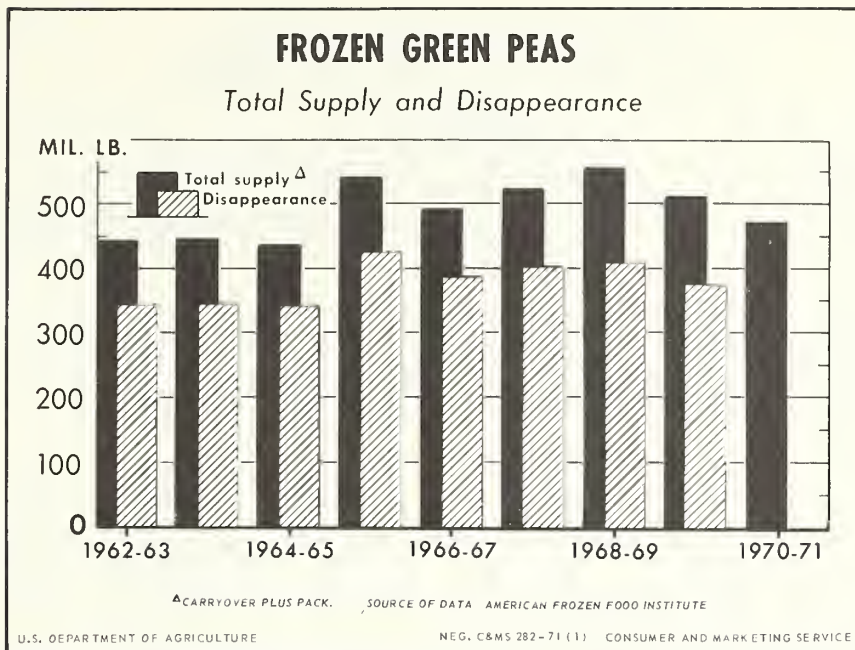


Figure 18

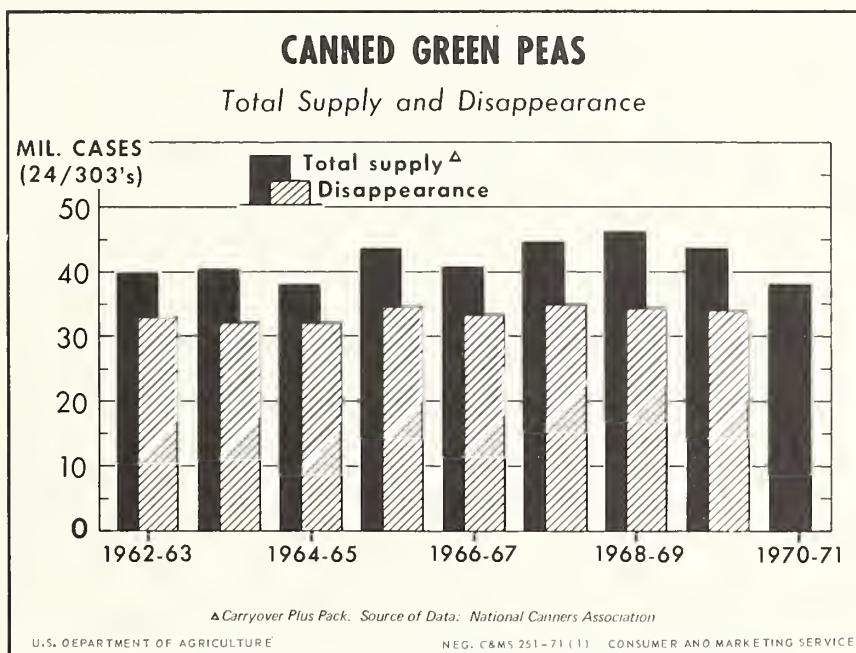


Figure 19

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Tomatoes

Year	: Acreage :	Yield :	:	:	:
	:Planted:For harvest:	per acre :	Production:	Price :	Value
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)

1971 Planted Acreage Guide
and probable production

(Planted acreage 7 percent more than in 1970)	264.7	1/19.46	5,100.5		
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Background statistics

1970	247.4	244.2	20.57	5,024.6	34.00	170,653
1969	272.4	266.9	18.35	4,897.7	34.70	170,132
1968	373.8	370.2	18.80	2/ 6,965.9	40.20	280,362
1967	333.4	327.6	15.80	5,187.4	42.80	221,982

1/ 1969/70 average yield.

2/ Includes some quantities not delivered because of economic conditions.

Comments

The 1970 acreage of tomatoes for processing was 9 percent less than in 1969, and one of the smallest of record. The reduction was concentrated in California, the principal source, although a majority of States reported smaller plantings.

High yields were reported in many producing States. In California, the average yield increased 8 percent and was a State record. The U. S. record average yield more than offset the reduced total plantings, the the 1970 production was almost 3 percent above the moderate 1969 output (Figure 20). Compared with the previous year, especially large production increases were recorded in Delaware, Maryland, New Jersey, Pennsylvania, Ohio and Indiana. In California, output was down slightly and substantial cutbacks were reported in New York where plantings were small, and in Texas where rains checked yield. Two-thirds of the 1970 total production was in California.

The 1968 record tonnage for processing resulted in a huge supply of canned tomatoes and tomato products. However, reduced packs in 1969 and 1970 have resulted in an improved balance in the current season. Total supplies (carry-over plus pack) of canned tomatoes, tomato juice and chili sauce are indicated to be about in line with market potential. Although data on retail packs are not available, 1970/71 institutional supplies of tomato catsup are indicated to be well below the high level of the two previous seasons.

Reflecting the smaller supplies in 1970/71, canners' prices for processed tomatoes are showing significant improvement over those of last winter. Also, the stronger domestic market attracted an increased import volume of canned tomatoes in 1970.

Canned Tomatoes

The carryover in 1970 was down substantially from a year earlier, but a 22 percent larger pack (basis 24/303's) was more than offsetting. The 1970/71 total supply was estimated at 50.9 million cases, up 1.3 million cases from last year. Packs in California, Ohio, and the Ozarks were increased sharply but much smaller packs were reported in Indiana, Florida, and Texas as well as in Colorado and Utah.

In the early winter, trade reports indicated that prices for canned tomatoes were averaging above those for last season. Even though prices are higher, the 1970/71 total disappearance is expected to closely match that of last season. If so, the 1971 carryover of canned tomatoes will be moderate.

Tomato Juice

The carryover in 1970 was down sharply but a larger pack was about offsetting. The 1970/71 total supply was estimated at 46.4 million cases, basis 24/303's, slightly less than the 1969/70 total of 46.9 million cases.

Prices for packs of 24/2's are about equal to a year ago. However, moderately higher prices compared with last winter are indicated for cases of 12/46 ounce. If total disappearance in the 1970/71 season approximates that in recent seasons, the 1971 carryover of tomato juice will be small.

Canned Chili Sauce

The 1970/71 supply is estimated at 2.3 million cases, basis 24/303's. Total supply last season was 2.6 million cases. Assuming a normal rate of disappearance, 1971 carryover will be small.

Tomato Catsup

Data are available only for institutional packs. For these packs, the 1970/71 supply is estimated at 8.0 million actual cases, down 1.6 million from last season.

This winter, canners' prices for packs of 6/10's range from moderately to substantially above a year earlier. Prices for 24/14 ounce containers (retail size) are up moderately. The 1970/71 total disappearance of institutional sizes is expected to at least match the 1969/70 total, and carryover may be small.

1971 Guide

The 1971 guide for tomatoes for processing is a planted acreage 7 percent more than in 1970. Such an acreage, with normal abandonment and a 1969-70 average yield, will result in a production slightly more than in 1970.

Supply and Disappearance of Canned Tomatoes and Selected Tomato Products

Commodity	Marketing Season		
	1970-71	1969-70	1968-69
<u>Canned Tomatoes</u>	<u>Million cases (basis 24/303's)</u>		
Carryover	11.9	17.6	11.1
Pack	39.0	32.0	48.4
Total Supply	50.9	49.6	59.5
Disappearance	N.A.	37.7	41.9
Carryover	N.A.	11.9	17.6
<u>Tomato Juice</u>			
Carryover	10.4	13.2	11.1
Pack	36.0	33.7	40.2
Total Supply	46.4	46.9	51.3
Disappearance	N.A.	36.5	38.1
Carryover	N.A.	10.4	13.2
<u>Canned Chili Sauce</u>			
Carryover	.8	.9	.5
Pack	1.5	1.7	2.4
Total Supply	2.3	2.6	2.9
Disappearance	N.A.	1.8	2.0
Carryover	N.A.	.8	.9
<u>Tomato Catsup</u>	<u>Million cases (institutional containers only)</u>		
Carryover <u>1/</u>	2.6	4.7	1.8
Pack	5.4	5.0	10.9
Total Supply	8.0	9.6	12.7
Disappearance	N.A.	7.0	8.0
Carryover <u>1/</u>	N.A.	2.6	4.7

N.A. - Not available.

1/ Excludes stocks held by distributors.

Source: National Canners Association, and Bureau of the Census, U. S. Department of Commerce.

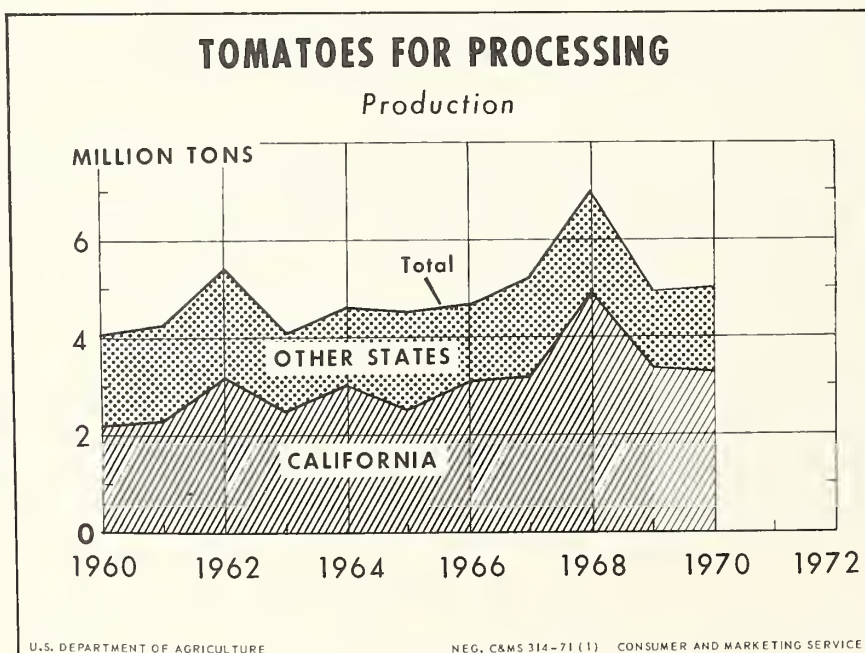


Figure 20

1971 Acreage-Marketing Guides
Vegetables for Commercial Processing

Spinach

Year	: Acreage :	Yield :	:	:	:
	:Planted:For harvest:	per acre	:Production:	Price	Value
	(1,000 acres)	(tons)	(1,000 tons)	(\$ per ton)	(\$1,000)

1971 Planted Acreage Guide
and probable production

Freezing (planted acreage 10 percent
more than in 1970) 14.3

1/ 6.2 80.0

Background statistics Freezing

1970	13.0	12.0	6.4	77.0	41.70	3,209
1969	11.2	9.7	6.0	58.1	42.90	2,495
1968	14.1	12.9	6.7	86.3	40.80	3,520
1967	16.5	14.7	5.8	85.5	41.00	3,506

1/ 1969-70 average yield.

Comments

The 1970 acreage of spinach for processing was increased 9 percent compared with the small 1969 plantings. All principal producing States increased plantings. In Arkansas and Oklahoma, spring crop increases more than offset reductions in acreage for fall harvest.

Average yield ranged from low in Florida to high in California. The 1970 total production was 45 percent more than in 1969; all the increase was in output for freezing. Cannerys and freezers each utilized about half the tonnage.

The 1970 carryovers of processed spinach ranged from moderate for canned to extremely light for frozen. But increased packs in 1970 have resulted in moderately heavier supplies for 1970/71 market needs.

Prices for California canned spinach are moderately above a year ago, although "eastern" prices match those for last season, according to trade reports. Prices for packs of frozen spinach are substantially higher.

Spinach - Canned (Data on 1970 carryover and pack are incomplete)

Spinach - Frozen

Although the 1970 carryover was small, production for freezing was a third more than in 1969. The 1970/71 total supply (carryover plus pack) of frozen spinach was estimated at 159.0 million pounds, 10 million more than a year earlier. This season, cumulative movement of frozen spinach has been at a relatively high rate. And on January 31, 1971 cold storage holdings were 32.1 million pounds, 5.4 million above that of a year earlier. Since the 1971 carryover will be small, an increase is recommended in production for freezing.

1971 Guide - Frozen Spinach

The 1971 guide is a planted acreage 10 percent more than in 1970. Such an acreage, with normal abandonment and a 1969-70 average yield, will result in a production 4 percent more than in 1970. Data on seasonal spinach production are shown in Figure 21.

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Supply and Disappearance of Frozen Spinach

Commodity	Marketing Season				
	1970-71	1969-70	1968-69	1967-68	1966-67
<u>Frozen Spinach</u>	<u>Million pounds</u>				
Carryover	20.5	41.8	42.7	34.7	30.4
Pack	138.5*	107.2	154.0	153.2	142.9
Total Supply	159.0*	149.0	196.7	187.9	173.3
Disappearance	N.A.	128.5	154.9	145.2	138.6
Carryover	N.A.	20.5	41.8	42.7	34.7

* Partially estimated. N.A. - Not available.

Sources: American Institute of Frozen Food Packers; Bureau of the Census,
U. S. Department of Commerce; and Statistical Reporting Service, USDA.

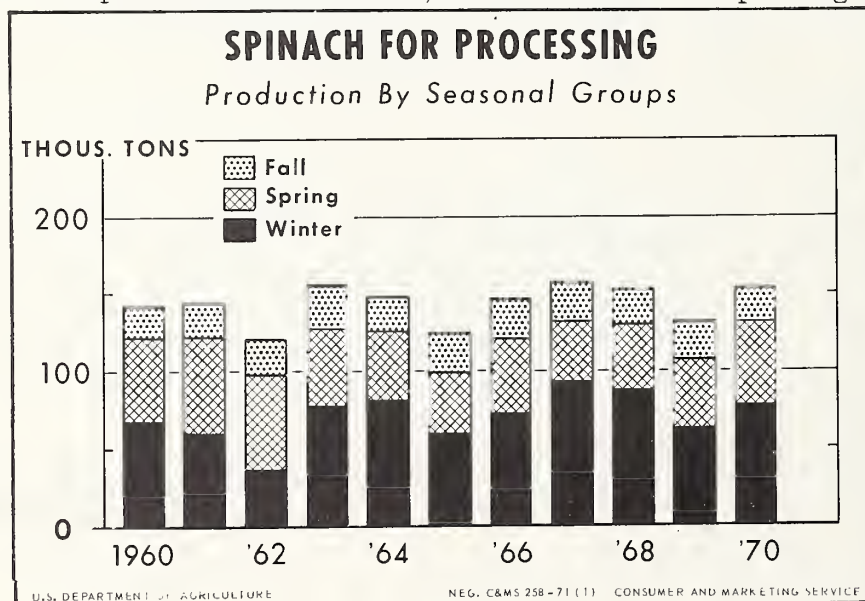


Figure 21